



# *User Guide*

## **UPS® Billing Centre**

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### UPS Billing Centre

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The **UPS Billing Centre** is a secure web-based invoice presentation and payment application that provides you the ability to enrol to view your UPS invoices in several formats (online, PDF, CSV and XML), dispute charges, generate reports and make payments online.

#### Available for:

- UPS Small Package
- UPS Freight®
- UPS Supply Chain Solutions®  
(air freight)

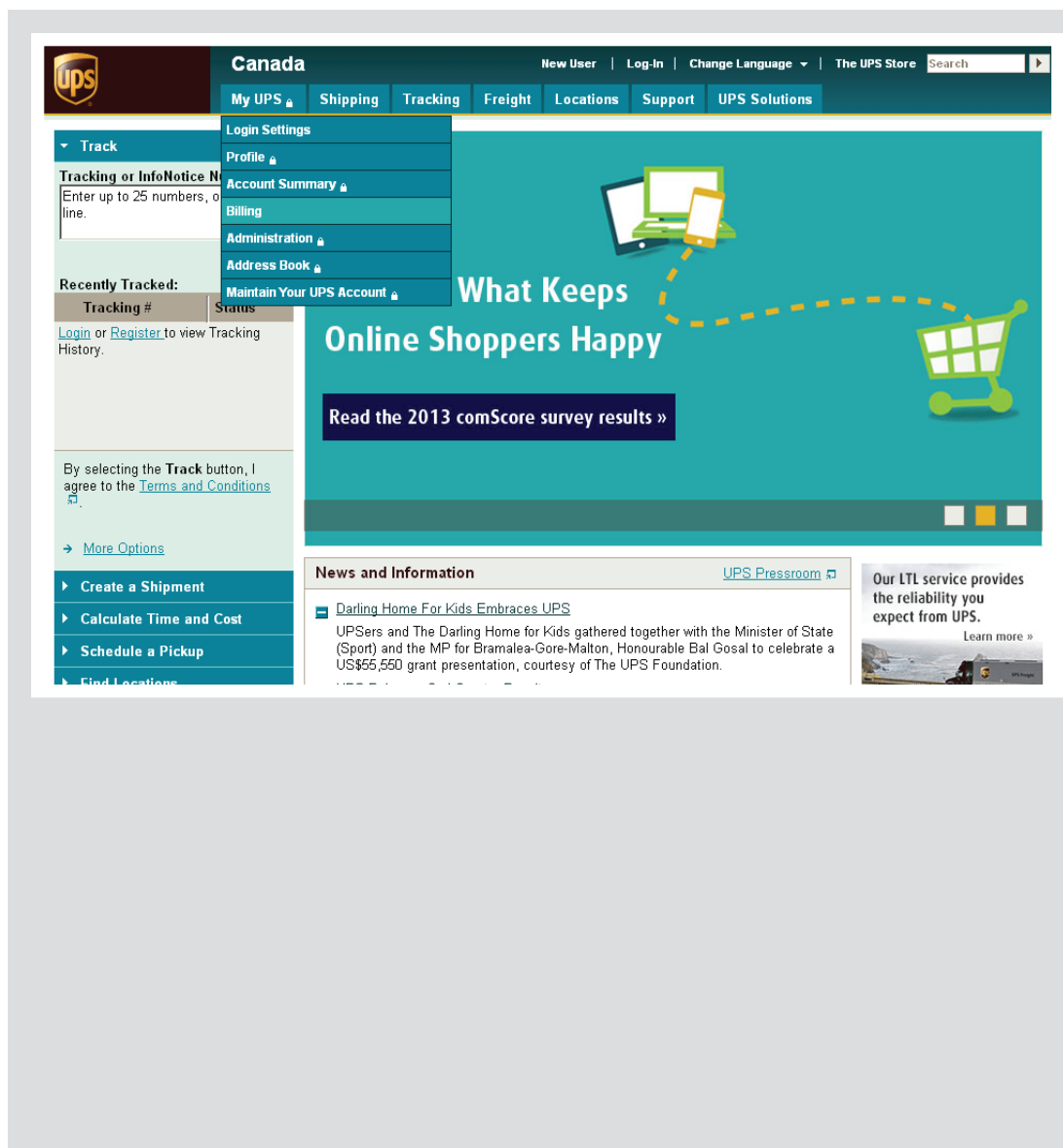
## Accessing the UPS Billing Centre

Go to the **ups.com**® Homepage.

Select the **My UPS** tab from the top of the page.  
The drop-down menu will display.

Select **Billing** from the drop-down menu.

You may also enter **ups.com/billing/ca** into your browser address bar.



## Accessing the UPS Billing Centre (cont.)

To enrol, select **Enrol in the UPS Billing Centre** link.

If you have enrolled previously in the UPS Billing Centre, select **Access**.

If you are not logged in to My UPS, you will need to log in.

If you do not have a My UPS ID, select **Register Now** to create an ID and password.

This login will grant you access to applications on **ups.com**, including the UPS Billing Centre.

The image displays two screenshots of the UPS Billing Centre website interface.

**Top Screenshot: Main Page**

- Header:** Includes the UPS logo, "Canada", and navigation links: My UPS, Shipping, Tracking, Freight, Locations, Support, and UPS Solutions. There are also links for "New User", "Log In", and "The UPS Store" with a search bar.
- Hero Section:** A banner with the text "UPS Billing" and "View, manage, and pay UPS invoices electronically".
- UPS Billing Centre:** A section describing the benefits of the UPS Billing Centre. It includes a link "Learn More About the UPS Billing Centre" and a link "Enrol in the UPS Billing Centre". A red box highlights the "Access »" button.
- UPS Billing Centre News:** A section with a "Download User Guide »" button and a "Learn More »" button.
- Electronic Billing Quick Links:** A section with links for "Access the UPS Billing Centre", "View the Invoice Guide and Glossary of Charges", "Enrol in the UPS Billing Centre", "Additional Billing Links", "Void a Shipment", and "Request Technical Support for Billing".
- UPS Billing Data:** A section with a link "Log in to UPS Billing Data".
- UPS Billing Centre Support:** A section with links for "Enrollment Support", "Invoice Support", "Payment Support", "Invoice Dispute Requests", "Administration Support", and "Reports Support".

**Bottom Screenshot: Log In or Register Page**

- Header:** Similar to the top screenshot, with the UPS logo, "Canada", and navigation links.
- Log In or Register:** A section with two main areas:
  - Returning Users:** A section with a "Log In" button. It includes a "User ID:" field, a "Password:" field, a "Remember Me" checkbox, and a "Log In" button. A red box highlights the "Log In" button.
  - New Users - Register Now:** A section with a "Register Now" button. It includes a "Need a My UPS ID?" section with a "Register Now" button. A red box highlights the "Register Now" button.

## Enrolment

## Account Invoice Authentication

You will need to complete Account Invoice Authentication (AIA) to confirm you currently have access to invoice information for each account to be enrolled in the UPS Billing Centre. Both individual accounts and Consolidated Payment Plans (CPPs) can be enrolled using the AIA process.

You also will need to provide the following information from one of your last three Delivery Service Invoices or an International Package Service Invoice generated within the last 45 days in order to successfully authenticate your UPS account:

- Invoice Number
- Amount due this period
- Invoice Date
- Control ID

**Note:** Enrolment of a CPP requires that AIA information be provided from a plan summary invoice.

UPS Billing

UPS Billing Center

### Enrol

[Help](#)

Please authenticate your UPS account by providing the requested information from your invoice.

UPS Billing Center small package enrollment will discontinue all other electronic small package invoicing enrollments. Please inform recipients of the UPS small package invoice to access Billing Center for these invoices.

**Are you enrolling a UPS Small Package, UPS Freight or Supply Chain Solutions account?**

UPS Small Package Account


☒ Individual UPS Account    ☐ Consolidated Payment

**UPS Account Number:** (6 characters)

**Country:**

UNITED STATES

[Cancel](#)



Plan 0477EG

074SA000V69W427

UPS INNOVEX SOLUTIONS  
12380 MORRIS RD  
ALPHARETTA, GA 30005-4177

**Delivery Service Invoice**  
 Invoice date June 8, 2013  
 Invoice number 0000Y11W00000  
 Shipper number 1YE595  
 Control ID 3S28  
 Page 1 of 9

**Sign up for electronic billing today!**  
[Visit ups.com/billing](#)

For questions about your invoice, call:  
 (800) 811-1648  
 Monday - Friday  
 8:00 a.m. - 9:00 p.m. E.T.

or write:  
 UPS  
 P.O. Box 7247-0244  
 Philadelphia, PA 19170-0001

UPS Billing

UPS Billing Center

### Authenticate

[Help](#)

**Enter Account Information**

Please authenticate your UPS account by providing the requested information from your invoice.

[Invoice Number:](#) (6-13 characters)

[Amount due this period:](#)(Example: 1234.56)

[Invoice Date:](#) (mm/dd/yyyy)

[Control ID :](#) (4 Characters)

(Optional, but this value is required if it is present on your invoice.)

[Cancel](#) [Continue](#)

**Save Savings**

Effective savings this period	\$ 4.99
Amount due this period includes these savings.	
<a href="#">View summary section for details.</a>	

**Thank you for using UPS.**

**Summary of Charges**

Page	Outbound	Charge
1	11DC Character Document	\$ 96.74

## Enrolment (cont.)

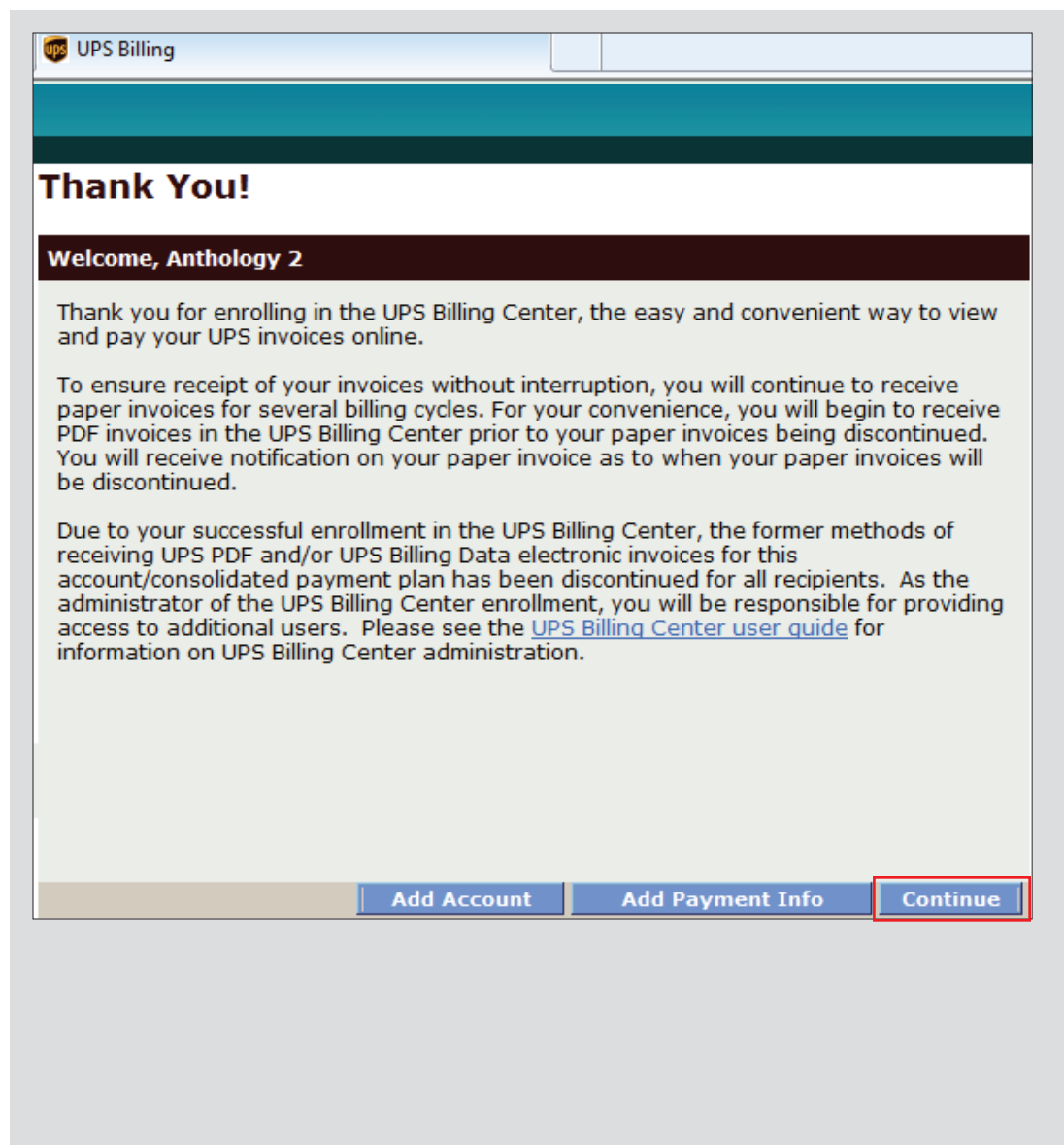
### Account Invoice Authentication (cont.)

You will be informed that you have successfully enrolled your account in the UPS Billing Centre.

Payment information can be added after enrolment is completed.

Additional accounts can be added through the **Administration** tab after logging in to the UPS Billing Centre.

When the **Continue** button is selected, the **Overview** page in the UPS Billing Centre will be presented.



## Overview

Tabs are located across the top of every screen throughout the UPS Billing Centre. These tabs can be selected to use the various features and functionalities.

You can view and/or select the following key elements on the **Overview** page:

- Selection between UPS Small Package, UPS Freight, UPS Supply Chain Solutions (air freight)  
**Note:** Any time you want to view package information, select this button. To view ground freight and air freight, deselect the button.
- Current Balance (amount outstanding) by transportation mode and country for entire Company (sum of all accounts that are selected under the Company)
- Set up Automatic Payments
- Accounts enrolled in Automatic Payments
- **Pay Now** button to access the Payments area

UPS Billing Centre - Canada

Welcome, John Doe | Logout

Home Invoice Payment Reporting Administration Support

Overview of UPS CUSTOMER 1 Canada - English

UPS Supply Chain Solutions UPS Freight UPS Package

Current Balance: \$804.95

> [Setup Automatic Payments](#) [Pay Now](#)

Note: Balance may reflect more than one account

Online support can be found in the links to your right, or by selecting this image.

You can view and download PDF copies of your UPS invoices and brokerage documentation. [View Your Invoice](#)

You can set up automatic payments to ensure that you don't pay late. [Pay Your Invoice](#)

You can customize available standard reports to meet your needs. [Visit Reporting](#)

**New Features Available**

[Archive History Page](#) - Provides the ability to download multiple pdf, csv or xml invoices at the same time. Go to the Archive History page to select invoices for download.

[UPS Billing Data file](#) - The UPS Billing Data file is available for download for each small package UPS invoice from July 8, 2013.

For more information about these changes, go to [What's New in Billing](#)

**Save a stamp. Pay online.**

Save stamps, save paper, and save time when you pay your UPS invoices through the UPS Billing Centre. [Set up payments](#)

**Billing Centre Quick Links**

- [Billing Centre Support](#)
- [View Invoice](#)
- [Add Accounts](#)
- [Manage Users](#)
- [View Reports](#)
- [Manage Payments](#)
- [Payment History](#)
- [Request a Refund](#)

**UPS.com Quick Links**

- [Manage Inbound Charges](#)
- [Manage Inbound Charges](#)
- [Avoid Charge Corrections](#)
- [Create a Shipment](#)
- [UPS TradeAbility International Tools](#)
- [Order Supplies](#)
- [Track a Package](#)
- [Void a Package](#)

# Invoice

Under the **Invoice** tab, you have access to Invoice Summary and Invoice Detail information, along with access to online, PDF, CSV and XML formats of their invoices. You can also dispute charges.

## Invoice Summary and Detail

The following Invoice Status information is displayed on the **Invoice** tab when you select **Company Summary**:

- Open/Past Due
- Past Due
- Payment Pending
- Open
- Underpayment/Adjustment
- Payment Returned
- Paid
- Overpayment/Adjustment
- Closed

Provide the following Search Criteria to see specific information for Domestic/Export and Import invoices:

- Account Type
- Invoice Date
- Invoice Status
- Invoice Type
- Account Number
- Invoice Number

Select an Invoice Number to view detailed invoice information.

## Invoice History

The **Archive History** feature within the Billing Centre enables you to:

- Retrieve up to 52 weeks' worth of past invoicing
- Download multiple invoices at once into a single consolidated file

The screenshot displays the UPS Billing Centre - Canada interface. The top navigation bar includes links for Home, Invoice, Payment, Reporting, Administration, and Support. The 'Invoice' tab is selected, and the 'Company Summary' button is highlighted. Below the navigation bar, there is a search criteria section with fields for Invoice Date (From/To), Invoice Status (Open/Past Due), Invoice Type (All), Account Number, and Invoice Number. A 'Search' button is present. Below the search criteria, there is a table of invoice information with columns: Date, Account Number, Invoice Number, Invoice Status, Original Billed Amount, Amount Due, Invoice Type, and Dispute. The table lists several invoices with their respective details.

Date	Account Number	Invoice Number	Invoice Status	Original Billed Amount	Amount Due	Invoice Type	Dispute
Aug 19, 2010	1YE96	9999999E99999	Past Due	\$106.50	\$105.33	Import	
Oct 05, 2013	1YE96	9999999E99999	Open	\$382.78	\$382.78	Domestic/Export	
Nov 11, 2010	1YE96	9999999E99999	Open	\$390.57	\$173.79	Import	
Aug 12, 2010	1YE96	9999999E99999	Open	\$299.51	\$163.05	Import	

Below the table, there is a section for 'Archive History' with a 'Search Criteria' section. This section includes fields for Invoice Date Range (Custom Date Range), Invoice Dates (From/To), Document Type (PDF Format, UPS Billing Data (.csv), XML), and Account Number. A 'Search' button is present. Below the search criteria, there is a table of invoice information with columns: Date, Account Number, Invoice Number, and Original Billed Amount. The table lists several invoices with their respective details.

Date	Account Number	Invoice Number	Original Billed Amount
Sep 14, 2013	1YE96	000000000E00000	\$258.67
Sep 21, 2013	1YE96	000000000E00000	\$262.34
Sep 28, 2013	1YE96	000000000E00000	\$199.22
Oct 05, 2013	1YE96	000000000E00000	\$382.78



## Invoice (cont.)

### Invoice Summary and Detail (cont.)

From the **Invoice Summary** screen, you can view key invoice information.

If you have the authority to make payments, you will have access to a **Pay Now** button to initiate payments from the **Invoice Summary** screen.

#### View PDF

Select **PDF** to view a PDF version of an invoice.

#### Print Remit Stub

Select the **Remit Stub** to view and print a remittance stub.

#### CSV Download

UPS Billing Data File

- Select **UPS Billing Data** to view in CSV format in 250 data elements.

XML Data File

- Select **XML Data Format** for XML formatted data of your invoice.

#### Printer Friendly

Select **Printer Friendly** to view and print a copy of the page.

You can continue to select links to drill down from the **Invoice Summary** page to view more detailed invoice information.

**UPS Billing Centre - Canada** Welcome, John Doe | Logout

Home Invoice Payment Reporting Administration Support

Invoice Summary Outbound Taxes

Invoice > Invoice Summary > Worldwide Service Detail

**Worldwide Service Detail**

Invoice Date: Oct 12, 2013  
 Invoice Number: 99999999999999  
 Account Number: 1YE595  
 Invoice Due Date: Oct 28, 2013

**Detail Information**

To view additional package level detail, select the appropriate link from the list below.

Pickup Date	Tracking Number	Service
10/04/13	1YE5959999999999999	Track Worldwide Express Saver
10/09/13	1YE5959999999999999	Track Worldwide Express
10/09/13	1YE5959999999999999	Track Worldwide Express
10/10/13	1YE5959999999999999	Track Worldwide Express Saver

**Total** \$194.55

[View/Download Invoice Data](#)

**View/Download Invoice Data**

Please select a file format to view/download your invoice.

☒ PDF

☐ Remit Stub (pdf)

☐ UPS Billing Data (.csv format, 250 data elements)

☐ XML Data Format

[Cancel](#) [Submit](#)

[Download](#) [Printer Friendly](#)

Amount Due: \$0.00

No. 2 Dispute

## Invoice (cont.)

### Tracking

From the **Shipment Detail** screen, you can select the **Track** button to track a package. You will be presented with tracking information from **ups.com**.

**UPS Billing Centre - Canada** Welcome, John Doe | Logout

Home Invoice Payment Reporting Administration Support

Invoice Summary Outbound Taxes

Invoice > Invoice Summary > Worldwide Service Detail

**Worldwide Service Detail**

CSV Download Printer Friendly

Invoice Date: Oct 05, 2013  
 Invoice Number: 9999999999999999  
 Account Number: 1YE595  
 Invoice Due Date: Oct 21, 2013

**Detail Information**

Invoice Amount Due: \$382.78

To view additional package level detail, select the appropriate link from the list below.

Pickup Date	Tracking Number
09/27/13	<a href="#">1YE5959999999999999</a>
09/27/13	<a href="#">1YE5959999999999999</a>
10/01/13	<a href="#">1YE5959999999999999</a>
10/02/13	<a href="#">1YE5959999999999999</a>
10/02/13	<a href="#">1YE5959999999999999</a>

**Canada** John Doe | Logout | The UPS Store Search

My UPS Shipping Tracking Freight Locations Support UPS Solutions

Tracking Number  **Track** [View Tracking History](#) [Other Tracking Options](#)

[Provide account validation](#) information for full tracking details.

**Tracking Detail** Print Help A A A

1YE5959999999999999 [Add Description](#)

Updated: 10/08/2013 10:52 Eastern Time

**Delivered**

**Delivered On:** Monday, 09/30/2013 at 10:14

**Left At:** Mail room

**Signed By:** UPS CUSTOMER 1

[Proof of Delivery](#)

**Shipping Information**

**To:** LOUISVILLE, KY, US

**Shipped By**

UPS Worldwide Express Saver®

**Additional Information**

**Worldwide Service Shipment**

Invoice Date: Oct 05, 2013  
 Invoice Number: 9999999999999999  
 Account Number: 1YE595  
 Invoice Due Date: Oct 21, 2013

**Shipment Information**

Invoice Amount Due: \$382.78

<b>Pickup Date:</b>	Sep 27, 2013	<b>Sender :</b>	JOHN DOE
<b>Tracking Number:</b>	1YE5959999999999999 <a href="#">Track</a>	<b>UPS CUSTOMER 1</b>	
<b>Service:</b>	Worldwide Express Saver	<b>123 STREET NAME</b>	
<b>Zone:</b>	584	<b>FREDERICTON, NB E3B6A2</b>	
<b>Weight:</b>	Letter	<b>CA</b>	
<b>Number of Packages:</b>	1	<b>Receiver:</b>	18NF PNF
<b>Ref. No.1:</b>			
<b>Ref. No.2:</b>			

## Invoice (cont.)

### Import Shipment Details

You can also utilize the UPS Billing Centre to:

- View all import charges, including Freight, Duties and Government Charges
- View Import Brokerage forms associated with the Shipment

**UPS Billing Centre - Canada** Welcome, John Doe | Logout

Home Invoice **Payment** Reporting Administration Support

Invoice Summary Import Shipment Summary

Invoice > Invoice Summary

### Invoice Summary

[Printer Friendly](#)

**Invoice Date:** Nov 11, 2010  
**Invoice Number:** 99999999999999  
**Account Number:** 1YES95  
**Billing Address:** UPS CUSTOMER 1  
 123 STREET NAME  
 FREDERICTON NB E3B 6A2 CA

**Invoice Due Date:** Nov 18, 2010  
**Amount Due:** \$173.79

Invoice Summary	
<b>Invoice Amount Due: CAD 173.79</b> <a href="#">Pay Now</a>	
To view the details of specific charges, select from the list below.	
Charge Description	Amount
Duty Amount	228.26
Customs GST	129.80
Brokerage GST/HST	2.80
QST	0.46
Total Government Charges	361.32
Bond Fee	29.25
Total Brokerage Charges	29.25
Total GST/HST	132.60
<b>Net Payable</b>	<b>CAD 173.79</b>
<a href="#">View/Download Invoice Data</a>	

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## Invoice (cont.)

Adjustments to an invoice can only be made at the detail level. The user selects the **Dispute** button at the bottom of the **Shipment Detail** screen.

### Adjustments/Disputes

From the **Shipment Detail** screen, you can dispute charges by selecting the **Dispute** button.

**UPS Billing Centre - Canada** Welcome, John Doe | Logout

Home Invoice Payment Reporting Administration Support

Invoice Summary Outbound Taxes

Invoice > Invoice Summary > Worldwide Service Detail > Worldwide Service Shipment Detail

**Worldwide Service Shipment Detail**

Printer Friendly

Invoice Date: Oct 05, 2013  
 Invoice Number: 9999999E99999  
 Account Number:  
 Invoice Due Date: Oct 21, 2013

Shipment Information		Invoice Amount Due: \$382.78
Pickup Date:	Sep 27, 2013	<b>Sender :</b> JOHN DOE UPS CUSTOMER 1 123 STREET NAME FREDERICTON, NB E3B6A2 CA  <b>Receiver:</b> JANE DOE UPS CUSTOMER 1 123 STREET NAME LOUISVILLE, KY 402181938
Tracking Number:	1YE595999999999999 <a href="#">Track</a>	
Service:	Worldwide Express Saver	
Zone:	584	
Weight:	Letter	
Number of Packages:	1	
Ref. No.1:		
Ref. No.2:		

Charge Information	
To request an adjustment, select the total charges.	
	Billed Charge
Worldwide Express Saver	\$40.80
Fuel Surcharge	\$6.32
<b>Total</b>	<b>\$47.12</b>

[View/Download Invoice Data](#) [Dispute](#)

## Invoice (cont.)

### Adjustments/Disputes (cont.)

When the **Dispute** button from the **Shipment Detail** screen is selected, the Dispute Transaction form will be displayed. Complete the form by entering the required fields.

The adjustment request will be reviewed and, if approved, a credit will be applied to the next invoice. You will be contacted directly via email if the adjustment request is not approved.

On submission of the Dispute Transaction form, a message informing you that the adjustment has been submitted successfully will be displayed.

### Dispute

**Dispute Transaction**[Help](#)

Please enter the amount of your requested adjustment and select the appropriate reason for this adjustment. Your request will be reviewed and when approved a credit will be included on your next invoice. We will contact you directly if your request is not approved.

**Transaction Date:**

**Account Number:**

**Phone Number:**   
(Enter number without spaces, dashes, or parentheses.)

**Please Select the dispute reason:**

**Description:**

[Continue](#) [Cancel](#)

## Payment

The **Payment** tab allows you to set up and/or arrange payment for an invoice. The Company Administrator must assign users the role to pay invoices. Only an Administrator has the ability to set up a Payment Account. There are four payment modules:

- One-Time Payments
- Automatic Payments
- Payment Activity
- Payment Accounts

### Payment Accounts

Before electronic payments can be initiated in the UPS Billing Centre, at least one Payment Account must be established.

You can add Payment Accounts or view, edit or delete existing accounts.

From the **Payment Accounts** tab in the Payment area of the UPS Billing Centre, select **Add Bank Account** to establish a Payment Account.

(For accounts already established, select **Edit** to update account information or **Delete** to remove an account.)

UPS Billing Centre - Canada

Welcome, John Doe | Logout

Home Invoice **Payment** Reporting Administration Support

Payments > Payment Accounts

Payment Accounts

Printer Friendly

**Manage Payment Accounts**

Select **Add Payment Card Account** or **Add Bank Account** to add additional methods of payment. Select **Edit** to update account information or **Delete** to remove an account.

Add Payment Card Account Add Bank Account

**Payment Accounts (1 item)**

Account Name	Payment Account Type	Account Number	Action
UPS CUSTOMER 1	American Express	999999999999	Edit Delete

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## Payment (cont.)

### Payment Accounts (cont.)

Next, the screen to add bank account information will be displayed. Enter the information in the appropriate required fields. Use only alphanumeric characters in the **Payment Account Name** field.

**Note:** Special characters (e.g., @, #, \*, ?) are not supported in the **Payment Account Name** field.

The screenshot shows the 'Add Bank Account' form within the UPS Billing Centre - Canada interface. The header includes the UPS logo, the title 'UPS Billing Centre - Canada', and a user greeting 'Welcome, John Doe | Logout'. Navigation tabs for Home, Invoice, Payment, Reporting, Administration, and Support are visible. The breadcrumb trail indicates the path: Payments > Payment Accounts > Add Bank Account.

The 'Add Bank Account' form contains the following fields and instructions:

- Instructions:** Please enter the information below. Required fields are indicated with an \*. When entering your Payment Account Name use only alpha-numeric characters; do not use special characters, such as ;, \*, #, =.
- \* Payment Account Name:** Text input field.
- \* Account Number:** Text input field.
- \* Bank Name:** Text input field.
- \* Routing Number:** Text input field.
- \* Account Type:** Dropdown menu with 'Checking' selected.
- Country:** Dropdown menu with 'Canada' selected.
- MEMO:** A field containing a sample MICR line: `⑈0000⑈ ⑆00000⑆000⑆ 000⑆000⑆0⑆`. Red brackets below this line identify the 'Routing number' (000000) and 'Account number' (000000000).

At the bottom right of the form are 'Cancel' and 'Save' buttons.

## Payment (cont.)

### One-Time Payments

Utilizing the One-Time Payment option, initiate the payment to UPS for each invoice to be paid.

**Note:** To schedule payments in the UPS Billing Centre, you will need at least one Payment Account established.

You will be required to select an invoice to pay every time.

Multiple invoices can be selected to streamline payment by selecting the top check box that selects all outstanding invoices, or by selecting only those invoices to be paid.

UPS Billing Centre - Canada

Home Invoice **Payment** Reporting Administration Support

Payments > One-Time Payments

One-Time Payments [Printer Friendly](#)

**Manage One-Time Payments**

**Search Criteria**

By providing either an Account Number, Invoice Date range, Due Date range, or Amount Due range and selecting **Search**, you can easily identify the invoice or invoices to be submitted for a One-Time Payment. Select the check box to the left of the invoice or invoices to be paid using the One-Time payment option and then select **Next**.

Payments made after 4:00 p.m. EST, will not be processed until next business day.

Account Number:

Invoice Date Between: From  To

Due Date Between: From  To

Amount Due Range: From  To

**Select Billing Accounts (3 items)**

<input type="checkbox"/>	Invoice Number	Account Number	Invoice Date	Due Date	Automatic Payment	Amount Due
<input type="checkbox"/>	0000000000000000	1YE95	Nov 11, 2010	Nov 10, 2010		\$173.79
<input type="checkbox"/>	0000000000000000	1YE95	Aug 19, 2010	Aug 26, 2010		\$85.33
<input type="checkbox"/>	0000000000000000	1YE95	Aug 12, 2010	Aug 19, 2010		\$163.05

UPS Billing Centre - Canada

Home Invoice Payment **Reporting** Administration Support

Payments > Payment Activity

Payment Activity [Printer Friendly](#)

**Payment Activity**

**Search Criteria**

Use the drop-down menus to search your payment activity by one or more of the following criteria: Account Number, Payment Type, Status. Or enter **Payment Made Between** Date information to retrieve payment activity for a specific time period.

Account Number:

Payment Type:  Status:

Payment Made Between: From  To

**(9 items)**

Account Number	Invoice Number	Payment Type	Payment Amount	Status	Payment Date	Action
1YE95	0000000000000000	One-Time	24.53	Paid	Aug 08, 2013	<a href="#">View Details</a>
1YE95	0000000000000000	One-Time	50.10	Paid	Feb 05, 2013	<a href="#">View Details</a>
1YE95	0000000000000000	One-Time	49.62	Paid	Jan 08, 2013	<a href="#">View Details</a>
1YE95	0000000000000000	One-Time	42.18	Paid	Dec 28, 2012	<a href="#">View Details</a>

Payments can be edited or cancelled any time prior to the scheduled payment date.



## Payment (cont.)

### One-Time Payments (cont.)

Next, you will be required to enter a Payment Date and select the desired Payment Account.

**Note:** *If the invoice is due upon receipt, the current day will be selected by default.*

A **One-Time Payments** confirmation screen will be displayed. You will be required to confirm the invoice and invoice amount. Once confirmed, please select **Next**.

UPS Billing Centre - Canada

Welcome, John Doe | Logout

Home Invoice **Payment** Reporting Administration Support

Payments > One-Time Payments

One-Time Payments

Printer Friendly

#### Manage One-Time Payments

**Search Criteria**

By providing either an Account Number, Invoice Date range, Due Date range, or Amount Due range and selecting **Search**, you can easily identify the invoice or invoices to be submitted for a One-Time Payment. Select the check box to the left of the invoice or invoices to be paid using the One-Time payment option and then select **Next**.

Payments made after 4:00 p.m. EST, will not be processed until next business day.

Account Number:

Invoice Date Between: From  To

Due Date Between: From  To

Amount Due Range: From  To

**Select Billing Accounts (3 items)**

<input type="checkbox"/>	Invoice Number	Account Number	Invoice Date	Due Date	Automatic Payment	Amount Due
<input type="checkbox"/>	9999999999999999	1YB95	Nov 11, 2010	Nov 18, 2010		\$173.79
<input type="checkbox"/>	9999999999999999	1YB95	Aug 19, 2010	Aug 26, 2010		\$85.33
<input type="checkbox"/>	9999999999999999	1YB95	Aug 12, 2010	Aug 19, 2010		\$163.05
<b>Total</b>						<b>\$422.17</b>

## Payment (cont.)

### Automatic Payments

Automatic Payments allows you to set up payments for any invoice presented in the UPS Billing Centre.

**Note:** All outstanding invoices must be paid using the One-Time Payments feature prior to setting up Automatic Payments.

To set up Automatic Payments, users must:

- Select the **Payment** tab and then **Automatic Payments**
- Select **Add Automatic Payments** followed by **Next**
- Select the **Account Number**

UPS Billing Centre - Canada

Welcome, John Doe | Logout

Home Invoice **Payment** Reporting Administration Support

Payments > Automatic Payments > Setup Automatic Payments

[Printer Friendly](#)

### Setup Automatic Payments

All existing invoices in the Billing Centre prior to Automatic Payments must be paid manually.

[Cancel](#) [Next](#)

#### Select Billing Accounts (2 items)

Provide the requested information then select **Next**.

<input type="checkbox"/>	Account Number
<input type="checkbox"/>	1 YE595
<input type="checkbox"/>	1 YE595

[Cancel](#) [Next](#)

## Payment (cont.)

### Automatic Payments (cont.)

- Using the drop-down menu, select **Payment Account**
- Provide the Payment Amount, Payment Transfer Date and Effective Period
- Select **Next**
- Verify Automatic Payment Details and select **Confirm**

Automatic Payments can be updated from the **Manage Automatic Payments** screen. Select **Edit** or **Cancel** to discontinue.

Automatic Payments will remain in effect until cancelled or until the date specified.

The first screenshot shows the 'Setup Automatic Payments' screen. It includes a navigation bar with 'Home', 'Invoice', 'Payment', 'Reporting', 'Administration', and 'Support'. The breadcrumb trail is 'Payments > Automatic Payments > Setup Automatic Payments'. The screen has a 'Cancel' and 'Next' button at the top right. The main content area is titled 'Setup Automatic Payments' and contains several sections: 'Selected Billing Accounts' with a 'Help' link and a note to provide requested information; 'Account Number' with the value '11YE595'; 'Select Payment Account' with a dropdown menu showing 'Doe Amex'; 'Select Pay Amount' with radio buttons for 'Total Amount Due' (selected), 'Total Amount With a Limit of \$' (with a text input and 'Ex: NNNNNN'), and 'On Due Date'; 'Select Payment Transfer Date' with radio buttons for 'On the Monday of every week' (selected), 'Day(s) before due date' (with a text input), and 'On Due Date'; and 'Select Effective Period' with radio buttons for 'Until Cancelled' (selected) and 'Until Date' (with a date picker). At the bottom right, there are 'Cancel' and 'Next' buttons.

The second screenshot shows the 'Confirm Automatic Payments' screen. It has the same navigation bar and breadcrumb trail. The main content area is titled 'Confirm Automatic Payments' and contains a 'Cancel' and 'Confirm' button at the top right. The 'Selected Billing Accounts' section shows the account number '9999E9999'. The 'Automatic Payment Summary' section displays the following details: 'Payment Account: Doe Amex', 'Payment Options: Total Amount Due', 'Pay Interval: On the Monday of every week', and 'Effective Period: Until Cancelled'. At the bottom right, there are 'Cancel' and 'Confirm' buttons.

## Payment (cont.)

### Payment Activity

You can view One-Time or Automatic Payments on the **Payment Activity** tab. Up to one year of payment activity is available in the UPS Billing Centre.

If a payment has not been processed, you can edit the payment date or cancel scheduled payments.

UPS Billing Centre - Canada

Welcome, John Doe | Logout

Home Invoice **Payment** Reporting Administration Support

Payments > Payment Activity

Payment Activity

[Printer Friendly](#)

**Payment Activity**

**Search Criteria**

Use the drop-down menus to search your payment activity by one or more of the following criteria: **Account Number, Payment Type, Status.** Or enter **Payment Made Between Date** information to retrieve payment activity for a specific time period.

Account Number: All

Payment Type: All Status: All

Payment Made Between: From To Search

**(9 items)**

Account Number	Invoice Number	Payment Type	Payment Amount	Status	Payment Date	Action
1YE595	9999999999999999	One-Time	24.53	Paid	Aug 08, 2013	<a href="#">View Details</a>

## Reporting

Six **Standard Reports** are available in the UPS Billing Centre. You can create reports to provide insight into shipping costs. Additionally, reports can be used to analyze, allocate and reconcile charges more effectively.

You can create and download the following reports for both Domestic/Export and Import invoices:

- Invoice Summary
- Invoice Detail
- Reference Number Detail
- Tracking Number Detail
- Address Correction Detail
- Approved Reference Number Detail

You can also create a report by selecting the **Reporting** tab, and then select the desired report from the list of standard reports.

Once the report has been selected, the **Search Criteria** screen will be displayed.

Enter a date range (required), and then select a single or multiple Account Numbers. Drop-down menus may be used to select additional criteria. Then select **Search**.

UPS Billing Centre - Canada

Welcome, John Doe | Logout

Home Invoice Payment **Reporting** Administration Support

### Standard Reports

Description
<a href="#">Invoice Summary</a>
<a href="#">Invoice Detail</a>
<a href="#">Reference Number Detail</a>
<a href="#">Tracking Number Detail</a>
<a href="#">Address Correction Detail</a>
<a href="#">Approved Reference Number Detail</a>

### Invoice Summary Report

Report Customize This Report Batch Request

#### Search Criteria

Create an Invoice Summary Report by entering Invoice Date information (required), or selecting multiple Account Numbers, or an Invoice Number, or the Invoice Status; then select Search. To select multiple Account Numbers hold down the CTRL button and using the Left Mouse button select the desired account numbers. To view additional detail, select the desired Invoice Number.

Shipment Type: UPS Package Transaction Type: All Country: Canada

Account Number:  
Use the 'CTRL' button to select multiple accounts.  
All  
1YE995  
1YE995

Invoice Date: From 09/08/2013 To 10/08/2013

Invoice Number:

Invoice Status: All

Search Criteria: All

**Search**

## Reporting (cont.)

### Customize this report

You can customize all standard reports, with the exception of the Address Correction Detail report.

After selecting a Standard report, select the **Customize This Report** tab.

You can select the columns you want to display in a custom report. To reorder columns, use the Add/Remove functions to place the fields in the desired order.

**Note:** Custom Reports exceeding 1,000 rows must be viewed as a Batch Report. To view the complete report, save it under the **My Customized Reports** tab. Then, open the saved report and select the **Batch Request** tab.

The screenshot shows the 'Search Criteria' section of the UPS Billing Centre interface. It includes fields for 'Shipment Type' (UPS Package), 'Transaction Type' (All), and 'Country' (Canada). There are also date pickers for 'Invoice Date' (From 09/08/2013 to 10/08/2013) and a 'Help' link. Below these is a note about using the 'CTRL' button to select multiple accounts, followed by a list of account numbers (All, 1YE905, 1YE595). There are input fields for 'Invoice Number', 'Invoice Status' (All), and 'Search Criteria' (All). A warning message states: 'Custom Reports cannot exceed 1000 rows. To view the complete report, save it under the My Customized Reports tab. Then open the saved report and select the Batch Request tab.' Below this is a section titled 'Please select columns to display in a custom report.' which contains two lists: 'Available Fields' (Invoice Status, Fees, Taxable Charges, Non-Taxable Charges, Invoice Type) and 'Current Display Fields' (Account Number, Invoice Number, Invoice Date, Outbound Charges, Inbound Charges, Adjustment Charges, Service Refund, Info Based Services, Void Credits, Service Charges). Between the lists are 'Add >' and '< Remove' buttons. At the bottom right are 'Submit' and 'Cancel' buttons.

## Reporting (cont.)

### Batch Report

You can request Batch Reports for reports with large amounts of data. For reports with more than 1,000 records, a Batch Request must be used.

To create a Batch Request, select a Standard or saved Customized Report. Select the **Batch Request** tab, name the Batch Report and select **Create**.

Batch Reports created from Standard Reports can be shared with other UPS Billing Centre users.

**Note:** Batch Report requests will be processed within 24 hours.

When the Batch Report is available, a download icon will appear in the Actions column of the Batch Reports screen.

Select the **X** mark in the Actions column to delete the Batch Report.

**Note:** Select **When My Batch Report Is Ready** in the Administration/Profile section to receive a notification when your report is available.

The screenshot displays the UPS Billing Centre - Canada Reporting interface. The top navigation bar includes Home, Invoice, Payment, Reporting, Administration, and Support. The main content area is titled 'Invoice Summary Report' and contains a 'Search Criteria' section with fields for Shipment Type, Account Number, Invoice Date, Invoice Number, Invoice Status, and Search Criteria. Below this is a 'Batch Request' section with a 'Batch Report' tab and a 'Share with other Users' checkbox. The bottom section, 'Batch Reports', shows a table of reports categorized into 'Batch Reports Complete', 'Batch Reports Pending', and 'Batch Reports Failed'.

**Invoice Summary Report**

Search Criteria

Create an Invoice Summary Report by entering Invoice Date information (required), or selecting multiple Account Numbers, or an Invoice Number, or the Invoice Status; then select Search. To select multiple Account Numbers hold down the CTRL button and using the Left Mouse button select the desired account numbers. To view additional detail, select the desired Invoice Number. **Note: Batch Report requests will be completed within 24 hours.**

Shipment Type: UPS Package Transaction Type: All Country: Canada

Account Number: All YES95 YES95

Invoice Date: From 09/08/2013 To 10/08/2013

Invoice Number:

Invoice Status: All

Search Criteria: All

**Batch Request**

**Batch Report**

To share the Batch Report; select the check box to the left of Share with other users. Be sure to create a Batch Report Name and then select Create.

☐ Share with other Users

Batch Report Name:

**Batch Reports**

Batch Reports can be Downloaded by selecting the download icon, or Deleted by selecting the "X" icon.

**Batch Reports Complete**

Name	Request Date	Run Date	Private	Actions
UPS CUSTOMER 1	06/08/2009	06/09/2009	Y	Download X
UPS CUSTOMER 2	06/08/2009	06/09/2009	Y	Download X

**Batch Reports Pending**

Name	Request Date	Run Date	Private	Actions
UPS CUSTOMER 3	10/06/2009		Y	X
UPS CUSTOMER 4	10/06/2009		Y	X
UPS CUSTOMER 5	10/06/2009		N	X

**Batch Reports Failed**

No Information to Display

## Administration/Profile

The **Administration** tab is available to you if your role is the Administrator. Administrators can add and manage users and accounts, user profiles and email notifications.

If you are not assigned the Administration role, the **Profile** tab is available to you, where you can manage your email notifications.

### Administrator overview

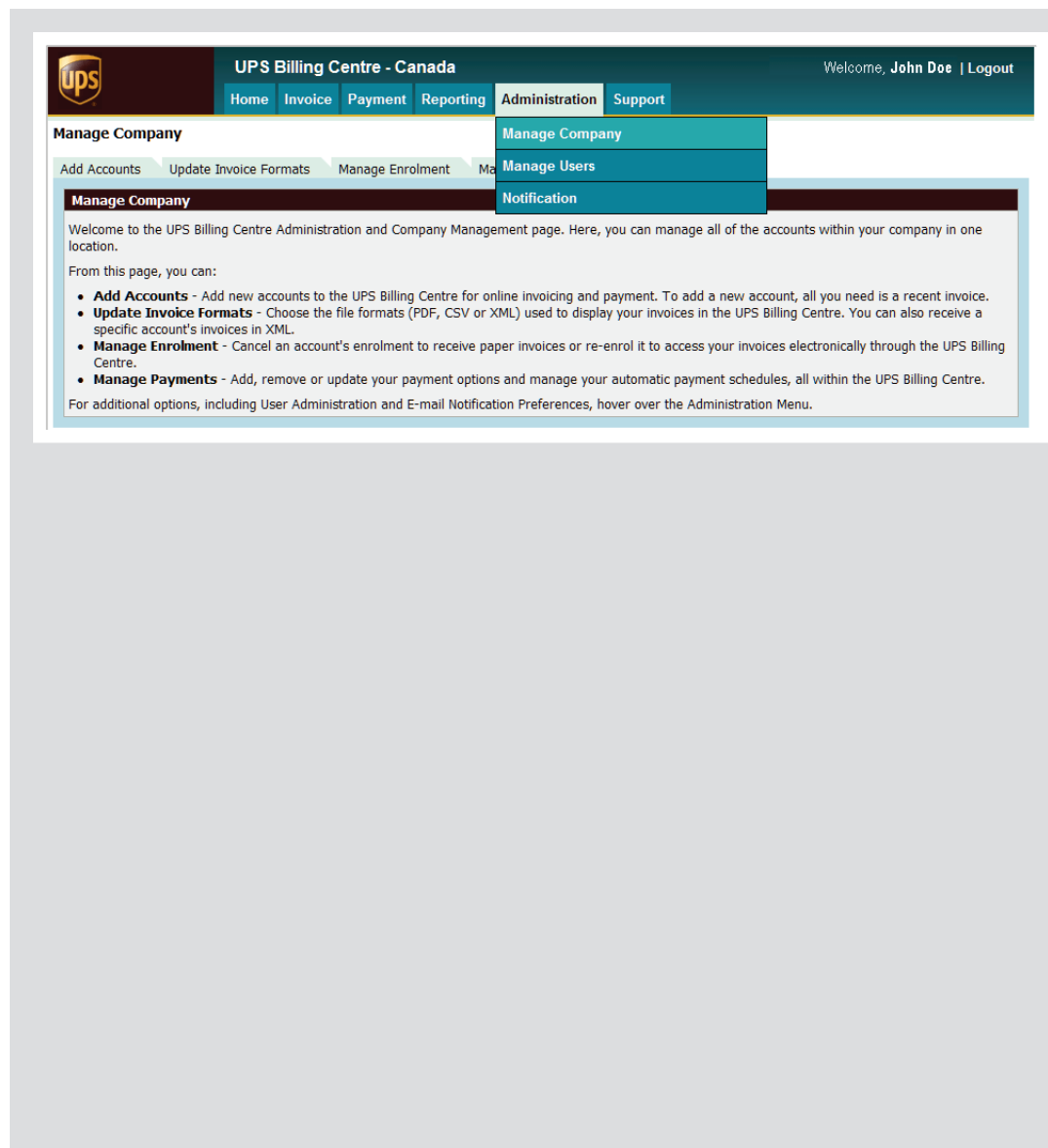
There are three tabs in Administration:

- Manage Company
- Manage Users
- Notification

### Company

Under Company there are four tabs:

- Add Accounts
- Update Invoice Formats
- Manage Enrolment
- Manage Payments





## Administration/Profile (cont.)

### Administrator – users

As the Administrator, you can view, edit, delete and add users from this screen.

To add a new user, enter the user's My UPS ID and associated email address and assign a role to the user.

Available roles: View Only, View and Adjust, View and Pay, View Pay and Adjust, Administrator or Plan Manager.

You will be presented with a message informing them that the user has been added successfully.

The added user will now appear in the user list under search results. To update/change a user's role, select **Edit**.

To remove a user from the UPS Billing Centre, select **Delete**.

The screenshot shows the 'UPS Billing Centre - Canada' interface. The top navigation bar includes links for Home, Invoice, Payment, Reporting, Administration, and Support. The user is logged in as 'John Doe'. The 'Administration' section is active, showing a sidebar with 'Manage Users' and 'Add New Users' options. The main content area is titled 'Add New Users' and contains a form for adding a new user. The form includes fields for 'MY UPS ID' and 'MY UPS ID E-mail Address'. Below these fields is a 'Role' section with five radio button options: 'View Only', 'View and Adjust', 'View and Pay', 'View, Pay and Adjust', 'Plan Manager', and 'Administrator'. Each role has a corresponding description of its permissions. At the bottom right of the form are 'Cancel' and 'Next' buttons.

**UPS Billing Centre - Canada** Welcome, John Doe | Logout

Home Invoice Payment Reporting Administration Support

**Manage Users**

Manage Users Add New Users

**Add New Users**

To add a new user to the UPS Billing Centre, enter the individual's **MY UPS ID**, associated **E-mail Address** and **Access Level**. Users with non-administrator access must be assigned one or more accounts.

\*MY UPS ID:

\*MY UPS ID E-mail Address:

Role:

- ☒ **View Only:** This user is able to view and/or download the invoices of their assigned accounts and update their e-mail preferences.
- ☐ **View and Adjust:** In addition to *View Only* access, this user may also request adjustments to charges.
- ☐ **View and Pay:** In addition to *View Only* access, this user may also set up bank/payment card information and submit payments.
- ☐ **View, Pay and Adjust:** This user may set up bank/payment card information, submit payments and request adjustments to charges.
- ☐ **Plan Manager:** In addition to *View, Pay and Adjust* access, this user may also assign their plan's accounts to new or existing users. Plan Managers may provide *View Only* through *View, Pay and Adjust* access.
- ☐ **Administrator:** This user has full access to all accounts, plans and functions of the UPS Billing Centre, including the ability to add/remove users, manage access assignments and cancel or re-enrol accounts.

Cancel Next

## Administration/Profile (cont.)

### Administrator – add account

To authenticate an account in the Add Account section, you will be required to provide the account number, invoice number, invoice amount due, invoice date and control ID from a previous invoice.

**Note:** A message will be displayed to you after an account has been successfully authenticated.

The image displays two screenshots of the UPS Billing Centre - Canada Administration/Profile page.

**Top Screenshot:** The page shows the 'Manage Company' section. The navigation bar includes 'Home', 'Invoice', 'Payment', 'Reporting', 'Administration', and 'Support'. The 'Administration' menu is expanded, showing 'Manage Company', 'Manage Users', and 'Notification'. The main content area welcomes the user and lists actions from this page: Add Accounts, Update Invoice Formats, Manage Enrolment, and Manage Payments.

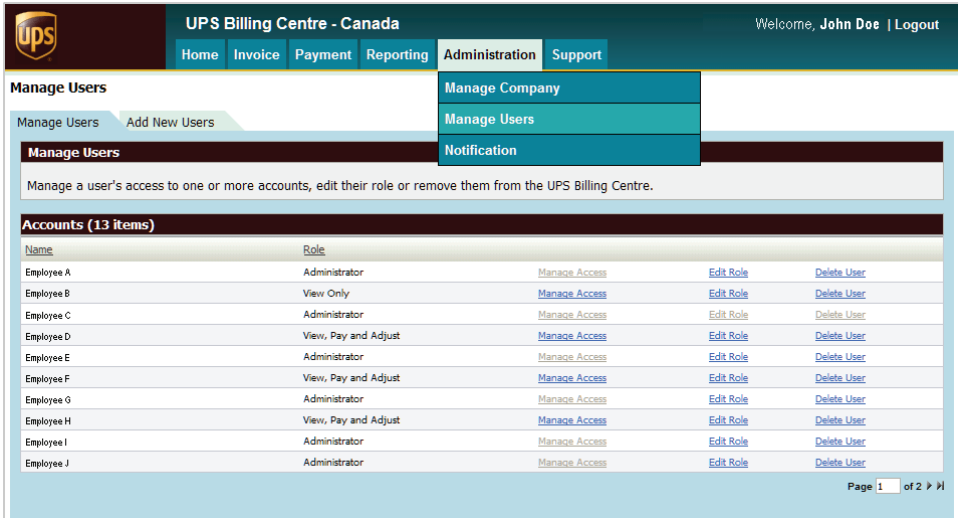
**Bottom Screenshot:** The page shows the 'Enter Account Information' form. The navigation bar is the same. The 'Add Accounts' tab is selected. The form includes a 'Help' link, a radio button for 'UPS Supply Chain Solutions®', a radio button for 'UPS Freight', and a radio button for 'UPS Package'. Below these are radio buttons for 'Individual UPS Account' (selected) and 'Consolidated Plan'. The form also has a field for 'UPS Account Number (6 characters)' and a dropdown for 'Country' (set to 'UNITED STATES'). 'Continue' and 'Cancel' buttons are at the bottom right.

## Administration/Profile (cont.)

### Administrator – manage account

As an Administrator, you have rights to all accounts in the company profile and are automatically associated to all accounts.

Non-Administrator users are not assigned to any accounts automatically and cannot view information from accounts they are not assigned to. Non-Administrator users must be assigned by an Administrator using Manage Account.



**UPS Billing Centre - Canada** Welcome, John Doe | Logout

Home Invoice Payment Reporting Administration Support

**Manage Users** Manage Company Manage Users Notification

Manage Users Add New Users

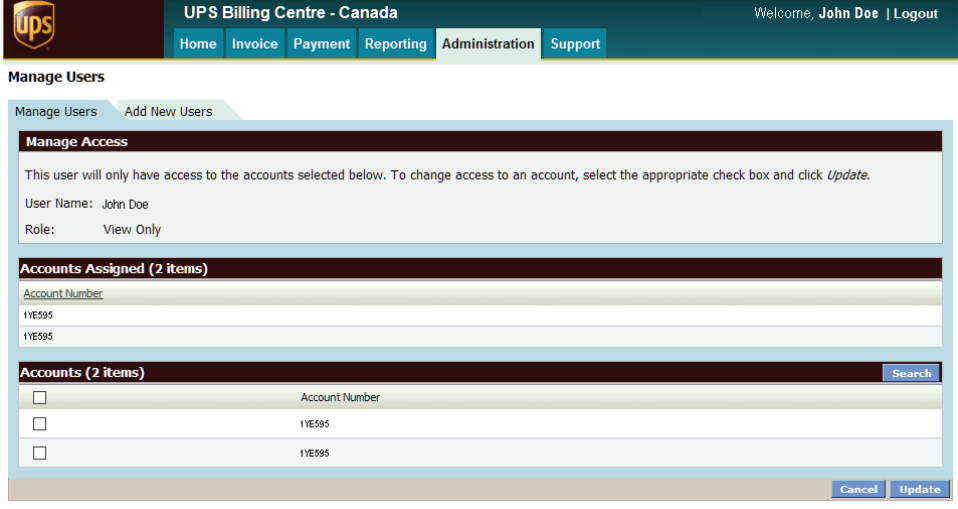
**Manage Users**

Manage a user's access to one or more accounts, edit their role or remove them from the UPS Billing Centre.

**Accounts (13 items)**

Name	Role	Manage Access	Edit Role	Delete User
Employee A	Administrator	<a href="#">Manage Access</a>	<a href="#">Edit Role</a>	<a href="#">Delete User</a>
Employee B	View Only	<a href="#">Manage Access</a>	<a href="#">Edit Role</a>	<a href="#">Delete User</a>
Employee C	Administrator	<a href="#">Manage Access</a>	<a href="#">Edit Role</a>	<a href="#">Delete User</a>
Employee D	View, Pay and Adjust	<a href="#">Manage Access</a>	<a href="#">Edit Role</a>	<a href="#">Delete User</a>
Employee E	Administrator	<a href="#">Manage Access</a>	<a href="#">Edit Role</a>	<a href="#">Delete User</a>
Employee F	View, Pay and Adjust	<a href="#">Manage Access</a>	<a href="#">Edit Role</a>	<a href="#">Delete User</a>
Employee G	Administrator	<a href="#">Manage Access</a>	<a href="#">Edit Role</a>	<a href="#">Delete User</a>
Employee H	View, Pay and Adjust	<a href="#">Manage Access</a>	<a href="#">Edit Role</a>	<a href="#">Delete User</a>
Employee I	Administrator	<a href="#">Manage Access</a>	<a href="#">Edit Role</a>	<a href="#">Delete User</a>
Employee J	Administrator	<a href="#">Manage Access</a>	<a href="#">Edit Role</a>	<a href="#">Delete User</a>

Page 1 of 2 >>



**UPS Billing Centre - Canada** Welcome, John Doe | Logout

Home Invoice Payment Reporting Administration Support

**Manage Users**

Manage Users Add New Users

**Manage Access**

This user will only have access to the accounts selected below. To change access to an account, select the appropriate check box and click **Update**.

User Name: John Doe  
Role: View Only

**Accounts Assigned (2 items)**

Account Number
1YE595
1YE595

**Accounts (2 items)** Search

<input type="checkbox"/>	Account Number
<input type="checkbox"/>	1YE595
<input type="checkbox"/>	1YE595

Cancel Update

## Administration/Profile (cont.)

### Notification

All users can manage their email preferences on the **Notification** tab.

All Email Notification options will be displayed. You must select all the desired boxes to receive an email when a specific activity occurs in the UPS Billing Centre. You can update an email address by accessing your My UPS profile through **ups.com**.

#### Administrator

The screenshot shows the Administrator interface for the UPS Billing Centre - Canada. The top navigation bar includes links for Home, Invoice, Payment, Reporting, Administration, and Support. The user is logged in as John Doe. The left sidebar shows the Notification tab selected. The main content area displays the Email Notifications settings. It includes a message about updating email notification settings and a link to the user's profile. Below this is a dropdown menu for Email Language Preference set to United States - English. A section titled 'Send an email' contains a list of notification options with checkboxes. The options are: When my invoice is ready for viewing (checked), days prior to invoice due date (unchecked), Confirming my payment was submitted (unchecked), Confirming setup/modification of automatic payment (checked), When my automatic payment threshold is exceeded (unchecked), Confirming my payment was made successfully (unchecked), When my payment fails (checked), When my payment card is about to expire (unchecked), and When my batch report is ready (unchecked). An Update button is located at the bottom right of the form.

#### Non-Administrator

The screenshot shows the Non-Administrator interface for the UPS Billing Centre - Canada. The top navigation bar includes links for Home, Invoice, Reporting, Profile, and Support. The user is logged in as John Doe - Non Admin. The left sidebar shows the Notification tab selected. The main content area displays the Email Notifications settings. It includes a message about updating email notification settings and a link to the user's profile. Below this is a dropdown menu for Email Language Preference set to Canada - English. A section titled 'Send an email' contains a list of notification options with checkboxes. The options are: When my invoice is ready for viewing (checked), days prior to invoice due date (unchecked), Confirming my payment was submitted (unchecked), Confirming setup/modification of automatic payment (checked), When my automatic payment threshold is exceeded (unchecked), Confirming my payment was made successfully (unchecked), When my payment fails (checked), When my payment card is about to expire (unchecked), and When my batch report is ready (unchecked). An Update button is located at the bottom right of the form.

## Support

You can obtain support from the **Support** tab within the UPS Billing Centre at **ups.com** which provides the following:

- Accessing help information available in the UPS Billing Centre
- Contacting UPS via email by completing a web form at **ups.com**
  - When completed, select the **Next** button at the bottom of the screen.
  - Complete the information fields, selecting **UPS Billing Centre** and enter your question or comment.
  - Select **Send Email** button in lower right-hand side of the screen.
- Contact UPS via telephone

The first screenshot shows the 'UPS Billing Centre - Canada' header with navigation tabs: Home, Invoice, Payment, Reporting, Administration, and Support. The 'Support' tab is active, displaying a 'Frequently Asked Questions' section with links to Adjustments/Disputes, Enrollment, Payments, Invoices, Administration, and Reporting. Below this is a 'How to contact us' section with links for Email UPS and Call UPS.

The second screenshot shows the 'Support' page with a sidebar for 'Support' links (Getting Started, Shipping, Tracking, Receiving Your Shipment, Billing and Payment, Technology Support) and a 'UPS Solutions' section. The main content area is titled 'Support' and contains an 'E-mail UPS' form. The form includes fields for 'Your Name' (UPS CUSTOMER 1), 'Your E-mail Address' (email@sample.com), 'Support Category' (Technical Support), and 'Support Topic' (Other). Below the form, a message states: 'Based on the information you have provided so far, the following support topics may answer your questions.' followed by a list of links: 'How much do supplies cost?', 'Why can't I calculate shipment cost using the Calculate Time and Cost application?', 'How do I ship a package from my shipping history in UPS Internet Shipping?', and 'I processed a shipment using UPS Internet Shipping and am now using UPS WorldShip (in Canada: UPS Connect). Now I can't find my UPS Internet Shipping packages in the UPS WorldShip (or UPS Connect) shipping history. Where are they?'. At the bottom right of the form are 'Cancel' and 'Next' buttons.

## Support (cont.)

### Telephone support

You may also contact UPS by telephone for questions about your invoices or with technical support concerns relating to the UPS Billing Centre. However, the telephone numbers for each are different.

- **Domestic/Import billing questions:**

If you have questions about your bill, call the Domestic or Import Billing Customer Support Number.

— Domestic Invoice: 1-888-592-6188

— Import Invoice: 1-888-520-9090

- **Technical support:**

If you have technical questions, call 1-888-877-8324.

- **Frequently asked questions:**

<http://www.ups.com/content/ca/en/resources>

- **Submit an email request:**

[https://www.ups.com/upsemail/input?loc=en\\_CA](https://www.ups.com/upsemail/input?loc=en_CA)

Domestic Invoice 1-888-592-6188

Import Invoice 1-888-520-9090

Technical Support 1-888-877-8324